



Courtland Consulting
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Project Requirements Document

Project Contacts:

Website: ERICSA – <http://www.ericso.org>

ERICSA Contacts: Christine Jennings, ERICSA Technology Committee Chair
Tim Morrison

Courtland Contacts: Michelle LeFevre, Executive Director
Sandi Beach, Creative Manager

Project Timeline

Oct. 1, 2014 Contract Start Date

Oct. 15 Website Project Requirements Review – Review website requirements, project contacts, process for approval and timeline
Attendees: Christine Jennings, Carla West, Margot Bean, Pam Sala, Elaine Poole, Patrick Quinn, Tim Morrison, Michelle LeFevre, Sandi Beach

- Need to send ERICSA logo – Christine sent to Sandi
- Need to send ERICSA photos
- Team will review site map before next meeting
- Courtland will send design templates before meeting on 10/20
- Provide list of names and email addresses for site admins, member logins and board - Tim

Oct. 20 Website Design/Content – Review sitemap, template designs and project requirements
Attendees: Christine Jennings, Carla West, Pam Sala, Elaine Poole, Tim Morrison, Michelle LeFevre, Sandi Beach, Loretta Everett, Lara Fors



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Oct. 27	Content Transfer Begins
Oct 31	Sign off on Project Requirements • Sign off on this document
Nov 24-26	Courtland Testing
1 st week of Dec.	User Acceptance Testing/Training • 1st week of December, 3 days for UAT • Meet on Monday/Tuesday (12/1 or 12/2) • Who is going to help with testing? ◦ Christine Jennings, Carla West, Margot Bean, Pam Sala, Elaine Poole, Patrick Quinn, Tim Morrison, Lara Fors • Training for Tim
2 nd week of Dec.	Pre-Implementation Prep • Final signoff my 12/12
Dec. 15-19	Go Live • Admin logins will be disabled and there will be a content freeze this week • DNS Update
After Launch	Post Implementation Meeting • Schedule Post Implementation Meeting the week after launch

Project Requirements Document

Process for approval?

- Design and content will be reviewed by Committee
- Contractual changes should be submitted to Christine for approval by Carla

Website Requirements

Website package includes:

Item #	Quote Description	Approved (Y or N)	Notes
1.	Initial web design and implementation of content management system website template (standard web design theme template from Courtland's template library) • responsive website design theme (desktop/tablet/mobile phone compatible) • It will also work with the latest browsers • tools (blog, media manager/gallery, newsletter/eblasts) • online HTML forms (Optional Donation, Contact Us and Sign Up for newsletter/eblasts) • one free implementation training on how to maintain the website (one 2 hour session for up to designated staff) Site includes ability to set privacy to pages and documents to website.	Y <i>Yes</i>	The current Board portal can be transferred over to the new website. Tim provided Courtland access to current website.

Project Requirements Document

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2.	Event Registration Management and Membership Management systems Key features: ○ Membership form ○ Conference registration form ○ Contact management via a client relationship management system ○ Email template design	Y <i>Yes</i>	
3.	Ongoing services: 1. Website hosting (10GB of web space) 2. Quarterly content management system security patches and upgrades 3. Website help desk support and online training 4. Client's website is featured in our online portfolio	Y <i>yes</i>	
4.	(Optional) Social Media Integration on Website 1. You news and events can be setup to automatically display from your website and on your Social Networking sites for Facebook and/or Twitter. Blog posts published on the main website will automatically be updated on the social networking sites with a brief description and link back to the main website. This allows for easy maintenance of information from one location that is shared across multiple online marketing channels.	N <i>No</i>	Committee did not approve

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5.	(Optional) Secure Socket Layer Certificate [highly recommended for protecting web databases and HTML credit card payment forms]	Y Yes	Committee will get back to Courtland on payment gateway processor
6.	(Optional) Stock Photography Client can choose stock photography to use on website. Price starts at \$25.00 for low-resolution web-ready images. Pricing for higher resolution images can be provided in a separate quote.	Y Yes	Committee has enough photos to use. Template will come with a couple icons and stock photos.
7.	(Optional) Domain Names	N No	ERICSA owns the Ericsa.org domain name. Tim will help with domain name server changes for the site implementation as necessary.
8.	Website Maintenance Nonprofit Discount Rate \$65.00 per hour	Y Yes	



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9.	Domains and login			
9.1.	Ericsa.org – no purchase, just	Y yes		ERICSA owns the Ericsa.org domain name. Tim will help with domain name server changes for the site implementation as necessary. Courtland will lead contacting Tim
10.	Email Accounts Creation			
10.1.	info@ericsa.org	yes		Tim will provide Courtland with a list of email accounts that need to be created

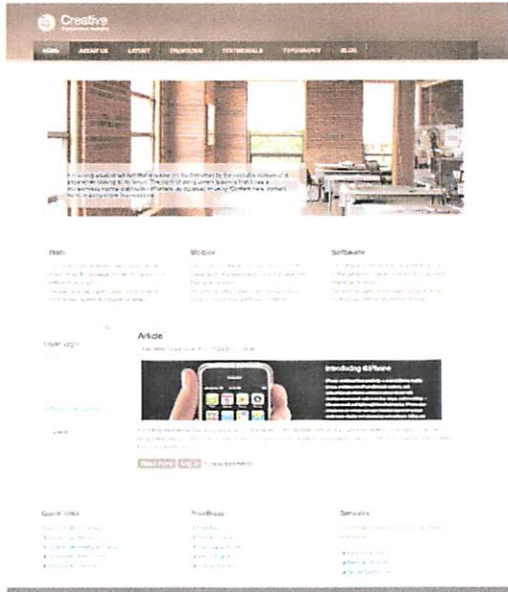


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11.	New - Google Analytics	Y yes		Tim will set up the account and Courtland will link the code to the site
12.	Administrators/Roles			
12.1.	Site administrators: Tim and Christine	Y yes		
12.2.	Board Members List	Y yes		Tim sent this to Sandi
12.3.	Members List	yes		Tim will send the list
13.	Template Design / Display on all pages			
13.1.	Template Option 1 was chosen. They would like a lighter background.	yes ^Y		

Project Requirements Document

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13.2.	Colors: blue	yes ^Y		
13.3.	ERICSA logo – need to spell out ERICSA and add the established date.	yes ^Y		Tim sent this to Sandi

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13.4.	Social Media Link: LinkedIn - https://www.linkedin.com/groups/Eastern-Regional-Interstate-Child-Support-6646020/about	Y yes		
13.5.	Add "User Login" to all pages	Y yes		This will be for all roles - admins, board and members
13.6.	Join ERICSA button	Y yes		
14.	Home Page Design			
14.1.	Slider	Y yes		
14.2.	3 Sections: • Conference • News • Policy & Legislation	Y yes		This may be changed, Courtland will provide training and the committee can change it then
15.	Content			

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15.1.	<u>New Content:</u> Add a page for 2015 Conference Add a calendar for the conference dates Tim will be adding new content and documents during training	Y yes		
15.2.	<u>Current Content:</u> ERICSA wants all content copied over Look and see if the Commissioner's corner has an RSS feed and replace the current site with the feed – ERICSA Don't copy over old newsletters Portal: consolidate pages, so there's not so many links	Y yes		
16.	Main Menu			
16.1.	Home Events (rename to "Conferences") Organize Events menu to promote upcoming conference 2015, two 2014 events and then display Past Conference information tab for all other past events. 2014 Employer Symposium	Y yes		Combine Member login

Project Requirements Document

Item #	Requirement	Approved (Y or N)	Passed Testing (Y or N)	Notes
	2014 Conference - Agenda and Handouts - Registration form - Conference Exhibitors & Sponsors 2013 Conference 2012 Conference 2011 Conference 2010 Conference 2009 2008 2007 - Photo Albums Members (change to "Resources") - Member Login (don't include in drop down but include on home page) - Board Login (don't include in drop down but include on home page) - Policy & Legislation (move these subpages as links) - Resolutions/Papers - Archived Resolutions and Papers - Intergovernmental Improvement - Commissioner's Corner (add RSS feed from OCSE website) - Useful Links Calendar (entries are open to public) About Us (change to "Organization")			

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Item #	Requirement	Approved (Y or N)	Passed Testing (Y or N)	Notes
	• What's New (remove from drop down) • Bylaws • History • Past Presidents <i>- should the order be switched to the latest on the top? Yes, change order. Add a link to the current president's LinkedIn account</i> • Felix Infausto Awards Organization (change to "About Us") • Executive • Directors • Honorary Board • Life Members ○ Ex Officio Members • News (remove from drop down) Useful Links (remove – placing under Resources) News • 2014 Conference • OCSE Chirps Contact Us			
17.	Footer Menu			



Item #	Requirement	Approved (Y or N)	Passed Testing (Y or N)	Notes
17.1.	Column 1: Quick Links or Main Menu Column 2: Resources Column 3: Contact Us Phone 321-947-6190 Email info@ericsa.org LinkedIn link	Y <i>Yes</i>		This may be changed, Courtland will provide training and the committee can change it then
18.	Board Portal			
18.1.	Update your profile Online Member Directory Contacts List ERICSA Administrative Documents • Board Contact List - doc • Board Contact List – Personal Information – doc • Board Handbook 9-11-14 - pdf • Board Letterhead - doc • Budget • Bylaws - doc • Committee Request Form doc • Minutes – Annual meeting (docs)	 <i>Yes</i>		Courland will help consolidate pages so there's not so many clicks Online Member Directory – we will create this from the CRM, the view will be different. It will automatically



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	○ ERICSA Annual Meeting Minutes, April 11-12, 2008 ○ ERICSA Annual Meeting Minutes, May 4-5, 2007 ○ ERICSA Annual Meeting Minutes, May 13-19, 2005 ○ ERICSA Annual Meeting Minutes, May 14, 2004 • Minutes – Mid-year Meeting (docs) ○ ERICSA Mid-year Meeting Minutes, October 24-25, 2008 ○ ERICSA Mid-year Meeting Minutes, November 11-12, 2005 • Strategic Plan 2008-2012 - doc ERICSA Committee Documents • Archives Committee • Audit Committee • Conference Planning Committee ○ 2010 ○ 2009 • Exhibitors and Sponsors Committee • Finance Committee • Interstate Improvement Committee • Newsletter Committee • Nominations Committee ○ 2010-11 • Onsite Coordination Committee ○ Onsite Committee Assignment 2010 Request Form Master ○ Onsite Committee Organizational Chart			display current members only. There will be no archive of past members for this page. Courtland will copy over all content. The committee will clean up the old data if needed after training,



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	• Policy and Legislation Committee ○ 2011-12 ○ 2010-11 ○ 2009-10 • Registration and Membership Committee • Resolutions and Bylaws Committee ○ Proposed Bylaw Amendments – 2010 ○ Bylaws – revised May 2011 • Scholarship Committee • Site Selection committee • Strategic Planning Committee: ○ 2010-11 ○ Handbook updates thru 7/10/12 • Technology Committee ○ ERICSA Technology Committee - Mid-Year Report - November 13, 2009 ○ ERICSA Technology Committee Meeting Notes 5-22-09 ○ ERICSA Technology Committee Final Report 3-27-09 ○ ERICSA Technology Committee Mid-year Report 10-24-08 ○ ERICSA Technology Committee Meeting Notes 7-16-08 ○ ERICSA Technology Committee Final Report 4-10-08 ○ ERICSA Technology Committee - Mid-Year Report - December 6, 2007 ○ ERICSA Technology Committee Year-end Report 4-26-07			



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	○ ERICSA Technology Committee Mid-year Report 11-14-06			
19.	Member Portal			
19.1.	Member Profile Online Member Directory Contacts List - doc 2013 Conference Attendee List	Y yes		
20.	Photo Gallery Tool	Y yes		
21.	Blog – News & Events	Y yes		
21.1.	RSS Feeds subscription	Y yes		
22.	Newsletter Signup			

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22.1.	One Newsletter template	Y yes		
23.	CRM – Contact Relationship Management			
23.1.	Groups: - Members - ERICSA Conference 2012 - ERICSA Conference 2013 - ERICSA Conference 2014 - ERICSA Conference 2015 - Non members - Board of Directors - Executive Committee	Y yes		Courtland will import any past members; do you have a list from each conference?
23.2.	Set up of the following forms. Form fields are listed below. 2015 Conference Registration Form - Membership form - Contact form	Y yes		
24.	2015 Conference Registration Form			



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24.1.	Early Bird Registration Discount Deadline: January 31, 2015 Advance Registration Discount Deadline: March 31, 2015 Regular Registration Rates apply after: March 31, 2015 Mailed Registrations Deadline: Please do not mail registrations in after April 15, 2015, as we cannot guarantee receipt in a timely manner for processing. Payment may be required onsite for registrations not received. Questions Regarding Registration: Please call 321-947-6190 or email tim@rainbowassoc-meetings.com This is my ____ ERICSA conference: • 1st • 2nd-5th • 6th-10th • 11+ How many years have you been in child support? • 1yr-2yr • 3yr-4yr • 5 yr-9 yr • 10 yr – 15 yr • 16 yr – 20 yr • 20+ yr Registrant's Information	yes		This form will create members automatically.



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	First Name Last Name Badge Name (First name or "Nickname") Title Organization/Agency/Company Name Address Address 2 City State Country/Territory/Providence (Non US only) Zip/Postal Code Direct Phone/Extension Fax Email (attendee's email) Billing Information (if applicable) Organization/Agency/Company Name To the Attention of Billing Phone Billing Email (contact's email) Purchase Order # Registration Type I am registering as (Select only one)			

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	• Conference Attendee • Speaker/Moderator • Exhibitor/Sponsor • Board Member • Life Member • Volunteer (Available only to Pennsylvania residents how have been Pre Approved (by Volunteer Coordinator) Conference Fees Registration Fees • \$265 – Early Bird – Submitted before January 31 • \$395 – Advanced – Submitted before February 1 – March 31 • \$425 – Regular – Submitted after March 31 • \$200 – Daily – Monday only • \$200 – Daily – Tuesday only • \$200 – Daily – Wednesday only • \$350 – Speaker/Moderator • \$200 – Board Member • \$0 – Life Member • \$250 – Volunteer (Pre-approved; PA only) • \$50 – Exhibitor (Floor Pass Only) • \$0 – Exhibitor (Comp with Booth) • \$0 – Exhibitor (Comp with Sponsorship)			

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	Extra Reception Tickets (Full registration includes 1 ticket) • President's Reception (Sunday) @ \$25 Extra Banquet Tickets (Full registration includes 1 ticket) • President's Reception (Wednesday) @ \$50 Extra Business Breakfast Tickets (Full registration includes 1 ticket) • Business Breakfast (Thursday) @ \$20 CLE: CLE Form showing all workshops attended for CLE credit. OPTIONAL and NOT included in your registration fee • CLE - \$25 Payment Information ERICSA Federal ID #: 41-1281093 <i>NOTE: Advance payment is preferred. However, we realize that some governmental entities will not pay until after competition of the conference. If payment will not be made until after the conference, please check the appropriate box below.</i> I will be paying • Online with a credit card • With a check before the conference • With a check after the conference			



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	Make checks payable to ERICSA and send to: ERICSA 1436 Rainbow Trail, Winter Springs, FL 32708 Comments Disclaimer: <u>Cancellations.</u> Cancellations must be received in writing prior to March 31, 2015 and are subject to a \$25.00 processing fee. Refunds will be processed within 30 days after the conference. Refunds will not be granted for cancellations received after March 31, 2015, nor will they be given for "no shows". <u>Posting Photos on Social Media.</u> Photos are taken throughout the conference of attendees while participating in conference activities. Your completion of this registration form gives your permission to take photos and to use them on Social Media and the ERICSA website. <u>Business Contact Information.</u> The contact information provided herein on the registration form will be shared with all conference attendees and conference sponsors.			
24.2.	Administration email: tim@rainbowassoc-meetings.com	Yes		



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25.	Membership Form			
25.1.	First Name Last Name Title Office/Agency Address City State Zip Code Phone Fax Email Agreement \$25/year fee	yes		Membership start date June 1, 2013 for everyone <i>can</i>
26.	Administration email: Deborah.edwards@acf.hhs.gov	Y yes		



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27.	Contact Us Form			
28.	First Name Last Name Company Phone Email You are contacting us regarding: • General Questions • Membership Question • Website Comment • Other Comments	Y yes		
29.	Administration email: tim@rainbowassoc-meetings.com	Y yes		
30.	SSL	Y yes		
31.	Payment Processor	yes		Intuit/QB
32.	Browser Compatibility			



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32.1.	Chrome v37	Y yes		Most used with ERICSA
32.2.	Internet Explorer v8	Y yes		
32.3.	Internet Explorer v9	Y yes		
32.4.	Internet Explorer v10	Y yes		Most used with ERICSA
32.5.	Internet Explorer v11	Y yes		Most used with ERICSA
32.6.	Firefox v#32	Y yes		Most used with ERICSA
32.7.	Safari v#10.9.2	Y yes		
33.	Responsive Design for Mobile & Tablet Compatibility			

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33.1.	Mobile phone screen size: Portrait: Min: 320px Max: 460px Landscape: Min: 480px Max: 640px over 720px	Y yes		
33.2.	Tablet screen sizes (vertical and horizontal): Tablet Portrait: 1536px Tablet Landscape: 2048px	Y yes		



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Customer Signoff

This document confirms the project scope and requirements for programming and testing. Any changes after receiving signoff on the requirements, requires a change control.

Project Requirements Signoff

Michelle LeFevre

10/24/2014

Courtland Consulting Project Manager (Printed Name)

Signature

Date

Carla West

Signature

11/7/14

Customer (Printed Name)

UAT/Launch Signoff

Courtland Consulting Project Manager (Printed Name)

Signature

Date

Customer (Printed Name)

Signature

Date



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